

**Probate Status Hearing for Failure to File an Inventory and Appraisal and  
for Failure to File the Annual or Biennial Account.**

|                      |  |   |   |
|----------------------|--|---|---|
|                      |  | <p><b>GLORIA CUEVAS</b>, maternal grandmother, was appointed guardian of the person and estate on 8/11/04.</p> <p>Letters issued 9/10/04.</p> <p>Inventory and appraisal was due January 2005.</p> <p>First account was due September 2005.</p> <p>Notice of Status Hearing was mailed to Cheryl Browns and Gloria Cuevas on 3/22/16. The mailing for Gloria Cuevas was returned as undeliverable. A second Notice of Status Hearing was mailed to Gloria Cuevas on 4/5/16.</p> | <p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u><b>Note:</b></u> Pages 1, 2 and 3 are related minors (siblings).</p> <p>1. Need inventory and appraisal and first account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p> |
|                      |  |   |   |
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|                      |  |   |   |
| <b>Cont. from</b>    |  |   |   |
| <b>Aff.Sub.Wit.</b>  |  |   |   |
| <b>Verified</b>      |  |   |   |
| <b>Inventory</b>     |  |   |   |
| <b>PTC</b>           |  |   |   |
| <b>Not.Cred.</b>     |  |   |   |
| <b>Notice of Hrg</b> |  |   |   |
| <b>Aff.Mail</b>      |  |   |   |
| <b>Aff.Pub.</b>      |  |   |   |
| <b>Sp.Ntc.</b>       |  |   |   |
| <b>Pers.Serv.</b>    |  |   |   |
| <b>Conf. Screen</b>  |  |   |   |
| <b>Letters</b>       |  |   |   |
| <b>Duties/Supp</b>   |  |   |   |
| <b>Objections</b>    |  |   |   |
| <b>Video Receipt</b> |  |   |   |
| <b>CI Report</b>     |  |   |   |
| <b>9202</b>          |  |   |   |
| <b>Order</b>         |  |   |   |
| <b>Aff. Posting</b>  |  |   |   |
| <b>Status Rpt</b>    |  |   |   |
| <b>UCCJEA</b>        |  |   |   |
| <b>Citation</b>      |  |   |   |
| <b>FTB Notice</b>    |  |   |   |
|                      |  | <p><b>Reviewed by:</b> KT</p> <p><b>Reviewed on:</b> 4/22/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 1 - Atondo</b></p>   |   |

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|----------------------|--|---|---|
|                      |  | <p><b>GLORIA CUEVAS</b>, maternal grandmother, was appointed guardian of the person and estate on 8/11/04.</p> <p>Letters issued 9/10/04.</p> <p>Inventory and appraisal was due January 2005.</p> <p>First account was due September 2005.</p> <p>Notice of Status Hearing was mailed to Cheryl Browns and Gloria Cuevas on 3/22/16. The mailing for Gloria Cuevas was returned as undeliverable. A second Notice of Status Hearing was mailed to Gloria Cuevas on 4/5/16.</p> | <p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><u><b>Note:</b></u> Pages 1, 2 and 3 are related minors (siblings).</p> <p>2. Need inventory and appraisal and first account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p> |
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| <b>Cont. from</b>    |  |   |   |
| <b>Aff.Sub.Wit.</b>  |  |   |   |
| <b>Verified</b>      |  |   |   |
| <b>Inventory</b>     |  |   |   |
| <b>PTC</b>           |  |   |   |
| <b>Not.Cred.</b>     |  |   |   |
| <b>Notice of Hrg</b> |  |   |   |
| <b>Aff.Mail</b>      |  |   |   |
| <b>Aff.Pub.</b>      |  |   |   |
| <b>Sp.Ntc.</b>       |  |   |   |
| <b>Pers.Serv.</b>    |  |   |   |
| <b>Conf. Screen</b>  |  |   |   |
| <b>Letters</b>       |  |   |   |
| <b>Duties/Supp</b>   |  |   |   |
| <b>Objections</b>    |  |   |   |
| <b>Video Receipt</b> |  |   |   |
| <b>CI Report</b>     |  |   |   |
| <b>9202</b>          |  |   |   |
| <b>Order</b>         |  |   |   |
| <b>Aff. Posting</b>  |  |   |   |
| <b>Status Rpt</b>    |  |   |   |
| <b>UCCJEA</b>        |  |   |   |
| <b>Citation</b>      |  |   |   |
| <b>FTB Notice</b>    |  |   |   |
|                      |  | <p><b>Reviewed by:</b> KT</p> <p><b>Reviewed on:</b> 4/22/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 2- Atondo</b></p>  |   |

**Probate Status Hearing for Failure to File an Inventory and Appraisal and  
for Failure to File the Annual or Biennial Account.**

|                      |  |   |  |
|----------------------|--|---|--|
|                      |  | <p><b>GLORIA CUEVAS</b>, maternal grandmother, was appointed guardian of the person and estate on 8/11/04.</p> <p>Letters issued 9/10/04.</p> <p>Inventory and appraisal was due January 2005.</p> <p>First account was due September 2005.</p> <p>Notice of Status Hearing was mailed to Cheryl Browns and Gloria Cuevas on 3/22/16. The mailing for Gloria Cuevas was returned as undeliverable. A second Notice of Status Hearing was mailed to Gloria Cuevas on 4/5/16.</p> | <p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> Pages 1, 2 and 3 are related minors (siblings).</p> <p>3. Need inventory and appraisal and first account or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p> |
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|                      |  |   |  |
| <b>Cont. from</b>    |  |   |  |
| <b>Aff.Sub.Wit.</b>  |  |   |  |
| <b>Verified</b>      |  |   |  |
| <b>Inventory</b>     |  |   |  |
| <b>PTC</b>           |  |   |  |
| <b>Not.Cred.</b>     |  |   |  |
| <b>Notice of Hrg</b> |  |   |  |
| <b>Aff.Mail</b>      |  |   |  |
| <b>Aff.Pub.</b>      |  |   |  |
| <b>Sp.Ntc.</b>       |  |   |  |
| <b>Pers.Serv.</b>    |  |   |  |
| <b>Conf. Screen</b>  |  |   |  |
| <b>Letters</b>       |  |   |  |
| <b>Duties/Supp</b>   |  |   |  |
| <b>Objections</b>    |  |   |  |
| <b>Video Receipt</b> |  |   |  |
| <b>CI Report</b>     |  |   |  |
| <b>9202</b>          |  |   |  |
| <b>Order</b>         |  |   |  |
| <b>Aff. Posting</b>  |  |   |  |
| <b>Status Rpt</b>    |  |   |  |
| <b>UCCJEA</b>        |  |   |  |
| <b>Citation</b>      |  |   |  |
| <b>FTB Notice</b>    |  |   |  |
|                      |  | <p><b>Reviewed by:</b> KT</p> <p><b>Reviewed on:</b> 4/22/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 3- Moreno</b></p>  |  |

**Probate Status Hearing Re: Failure to File a Petition for Final Distribution**

|  |   |  |
|--|---|--|
| <b>DOD: 1/18/06</b>  | <b>BETTY MARIE GLOVER</b> , daughter, was appointed as Executor with Full IAEA with bond of \$276,000.00 on 8/28/07. Bond was filed and Letters issued on 11/1/07.  | <b>NEEDS/PROBLEMS/COMMENTS:</b>  |
|  |   |  |
|  |   |  |
|  |   |  |
| <b>Cont. from 062014, 081714, 093014, 013015, 073015, 012016</b> | The appointment was appealed; however, pursuant to the Opinion entered 5/22/08 by the Fifth Appellate District, the order of the probate court was affirmed and costs were awarded to the Executor. Remittur was filed 7/23/08. | <b>Minute Order 1/20/16: Counsel represents that the property is now listed for sale and there has been a lot of interest.</b>   |
| <b>Aff.Sub.Wit.</b>  |   | <b>Note:</b> Attorney Fanucchi filed a "Notice of Lien for Attorney's Fees" alleging fees totaling \$1,630.00; however, there does not appear to be any Court order authorizing this sum to this attorney. |
| <b>Verified</b>  |   |  |
| <b>Inventory</b>   |   |  |
| <b>PTC</b>   | On 2/14/14, the Court set this status hearing for failure to file a petition for final distribution on 2/14/14.   |  |
| <b>Not.Cred.</b>   |   |  |
| <b>Notice of Hrg</b>   | <b>Status Report was filed 4/7/16. See report for details.</b>  | <b>1. Need First Account or Petition for Final Distribution.</b>   |
| <b>Aff.Mail</b>  |   |  |
| <b>Aff.Pub.</b>  |   |  |
| <b>Sp.Ntc.</b>   |   |  |
| <b>Pers.Serv.</b>  |   |  |
| <b>Conf. Screen</b>  |   |  |
| <b>Letters</b>   |   |  |
| <b>Duties/Supp</b>   |   |  |
| <b>Objections</b>  |   |  |
| <b>Video Receipt</b>   |   |  |
| <b>CI Report</b>   |   |  |
| <b>9202</b>  |   |  |
| <b>Order</b>   |   |  |
| <b>Aff. Posting</b>  |   |  |
| <b>Status Rpt</b>  |   |  |
| <b>UCCJEA</b>  |   |  |
| <b>Citation</b>  |   |  |
| <b>FTB Notice</b>  |   |  |
|  |   | <b>Reviewed by: skc</b>  |
|  |   | <b>Reviewed on: 4/22/16</b>  |
|  |   | <b>Updates:</b>  |
|  |   | <b>Recommendation:</b>   |
|  |   | <b>File 4 – Hunt</b>   |

Attorney William F. Docker (for James M. Bell, Successor Trustee)

**Eighth Account Current and Report of Trustee and Petition for its Settlement,  
and for Allowance of Trustee's Fees**

|                                     |                      |  |   |
|-------------------------------------|----------------------|--|---|
| <b>DOD: 7/24/2007</b>               |                      | <p><b>JAMES M. BELL</b>, sole surviving Successor Trustee, is Petitioner. (Successor Co-Trustee G. Thomas Caswell, Jr. is deceased.)</p> <p><b>Account period: 1/01/2015 – 12/31/2015</b></p> <p>Accounting - <b>\$923,663.14</b><br/> Beginning POH - <b>\$899,895.91</b><br/> Ending POH - <b>\$843,024.81</b><br/> (\$135,137.08 is cash)</p> <p>Trustee - <b>\$6,460.00</b><br/> (3/4 of 1% of \$861,942.94 market value of Trust Assets)</p> <p>Investment Fees - <b>\$7,439.56 (paid)</b><br/> (Advisory fees disbursed for 2015)</p> <p>Accountant - <b>\$710.00 (paid)</b><br/> (disbursed for 2015)</p> <p>Attorney - <b>\$1,228.00 (paid)</b><br/> (disbursed for 2015)</p> <p>Distributions - <b>\$54,000.00 (paid)</b><br/> (includes principal funds of \$44,938.17 disbursed to Karol Funch, surviving spouse)</p> <p><b>Petitioner prays for an Order:</b></p> <ol style="list-style-type: none"> <li>1. Settling, allowing and approving the Eighth Account and Report of the Trustee;</li> <li>2. Ratifying, confirming and approving all acts and transactions of the Trustee relating to the matters reflected in the Account and Report; and</li> <li>3. Authorizing and directing the Trustee to pay himself compensation for services rendered during the period of the Account and Report in the sum of <b>\$6,460.00</b>.</li> </ol> | <p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Note:</b> Probate status hearings for the filing of accountings are not required for this Trust.</p> |
| <b>Cont. from</b>                   |                      |  |   |
| <input type="checkbox"/>            | <b>Aff.Sub.Wit.</b>  |  |   |
| <input checked="" type="checkbox"/> | <b>Verified</b>      |  |   |
| <input type="checkbox"/>            | <b>Inventory</b>     |  |   |
| <input type="checkbox"/>            | <b>PTC</b>           |  |   |
| <input type="checkbox"/>            | <b>Not.Cred.</b>     |  |   |
| <input checked="" type="checkbox"/> | <b>Notice of Hrg</b> |  |   |
| <input checked="" type="checkbox"/> | <b>Aff.Mail</b> W/   |  |   |
| <input type="checkbox"/>            | <b>Aff.Pub.</b>      |  |   |
| <input type="checkbox"/>            | <b>Sp.Ntc.</b>       |  |   |
| <input type="checkbox"/>            | <b>Pers.Serv.</b>    |  |   |
| <input type="checkbox"/>            | <b>Conf. Screen</b>  |  |   |
| <input type="checkbox"/>            | <b>Letters</b>       |  |   |
| <input type="checkbox"/>            | <b>Duties/Supp</b>   |  |   |
| <input type="checkbox"/>            | <b>Objections</b>    |  |   |
| <input type="checkbox"/>            | <b>Video Receipt</b> |  |   |
| <input type="checkbox"/>            | <b>CI Report</b>     |  |   |
| <input type="checkbox"/>            | <b>9202</b>          |  |   |
| <input checked="" type="checkbox"/> | <b>Order</b>         |  |   |
| <input type="checkbox"/>            | <b>Aff. Posting</b>  |  |   |
| <input type="checkbox"/>            | <b>Status Rpt</b>    |  |   |
| <input type="checkbox"/>            | <b>UCCJEA</b>        |  |   |
| <input type="checkbox"/>            | <b>Citation</b>      |  |   |
| <input type="checkbox"/>            | <b>FTB Notice</b>    |  |   |

|                             |
|-----------------------------|
| <b>Reviewed by:</b> LEG     |
| <b>Reviewed on:</b> 4/22/16 |
| <b>Updates:</b>             |
| <b>Recommendation:</b>      |
| <b>File 5 - Funch</b>       |

Petitioner: Isidro Marcos (Pro per – Father of Sofia Castro)

## Petition for Visitation (as to SOFIA CASTRO only)

|            |               |   |   |    |
|------------|---------------|---|---|----|
|            |               | <b>ISIDRO MARCOS</b> , father of Sofia, is petitioner<br><br><b>MARIA CASTRO VARGAS</b> , maternal grandmother, was appointed guardian on 10/5/09 – <i>personal service</i> 3/27/16.<br><br>Mother: <b>MARIBEL MARCOS CASTRO</b> – <i>personal service</i> 3/27/16.<br><br><b>Petitioner states</b> he gets visitation every Sunday, 12-3 pm as the Court ordered. However, since his visits started they (guardian and minor) have been 15-20 minutes late arriving to where they are supposed to meet or they have petitioner drive to where they want him to pick minor up. Minor also would like to spend more time with petitioner. He is requesting overnight visits from Friday afternoon to Sunday afternoon. The days late were:<br>1/24/16 – 12:24 pm<br>1/30/16 – 12:30 pm<br>2/14/16 – 12:20 pm | <b>NEEDS/PROBLEMS/COMMENTS:</b><br><br><b>Petition is as to SOFIA CASTRO only. (Petitioner is not Leonardo's father.)</b><br><br><b>NOTE:</b> Minute order dated 1/7/16 (for previous petition for visits) ordered unsupervised visitation for Isidro Marcos (father/petitioner) every Sunday from 12:00 pm – 3:00 pm starting 1/10/16. Mr. Marcos is to pick the minor up with a proper child safety seat or the visit will not occur. |    |
|            |               |   |   |    |
|            |               |   |   |    |
|            |               |   |   |    |
| Cont. from |               |   |   |    |
|            | Aff.Sub.Wit.  |   |   |    |
| ✓          | Verified      |   |   |    |
|            | Inventory     |   |   |    |
|            | PTC           |   |   |    |
|            | Not.Cred.     |   |   |    |
| ✓          | Notice of Hrg |   |   |    |
|            | Aff.Mail      |   |   |    |
|            | Aff.Pub.      |   |   |    |
|            | Sp.Ntc.       |   |   |    |
| ✓          | Pers.Serv.    |   |   | w/ |
|            | Conf. Screen  |   |   |    |
|            | Letters       |   |   |    |
|            | Duties/Supp   |   |   |    |
|            | Objections    |   |   |    |
|            | Video Receipt |   |   |    |
|            | CI Report     |   |   |    |
|            | 9202          |   |   |    |
|            | Order         | x   |   |    |
|            | Aff. Posting  |   |   |    |
|            | Status Rpt    |   |   |    |
|            | UCCJEA        |   |   |    |
|            | Citation      |   |   |    |
|            | FTB Notice    |   |   |    |

|                        |
|------------------------|
| Reviewed by: 4/22/2016 |
| Reviewed on: SEF       |
| Updates:               |
| Recommendation:        |
| File 6- Castro         |

Petitioner: Brianna Shaw (Pro per - Mother)

Guardian: Norma Jeffrey (Pro per - Maternal great-grandmother)

## Petition for Visitation

|                          |                      |   |   |
|--------------------------|----------------------|---|---|
|                          |                      | <b>BRIANNA SHAW</b> , mother, is petitioner and requests modification of visitation.                | <b>NEEDS/PROBLEMS/COMMENTS:</b>   |
|                          |                      |   |   |
|                          |                      | <b>NORMA JEFFREY</b> maternal great-grandmother, was appointed guardian of the person on 3/29/2012. | <b>Continued from 3/16/16. Minute order states</b> parties are admonished with regard to properly serving all filed documents. Any additional supplemental documentation by Norma Jeffery is to be filed no later than 4/6/16 with any response by Brianna Shaw due by 4/20/16. The Court warns that missed filing dates may result in the Court not considering the documents. |
| <b>Cont. from 031616</b> |                      |   |   |
|                          | <b>Aff.Sub.Wit.</b>  |   | <ol style="list-style-type: none"> <li>Declarations were filed by Norma Jeffrey on 4/5/16. Need proof of service of declarations on Brianna Shaw (mother).</li> <li>Declaration was filed by Brianna Shaw on 4/22/16. Need proof of service of declaration on Norma Jeffrey (guardian).</li> </ol>  |
| ✓                        | <b>Verified</b>      | <b>Declarations filed 3/10/2016 by Guardian Norma Jeffrey.</b>                                      |   |
|                          | <b>Inventory</b>     | <b>Declarations (3) filed 4/5/2016 by Guardian Norma Jeffery.</b>                                   |   |
|                          | <b>PTC</b>           |   |   |
|                          | <b>Not.Cred.</b>     | <b>Declaration filed 4/22/2016 by Mother Brianna Shaw.</b>  |   |
| ✓                        | <b>Notice of Hrg</b> |   |   |
| ✓                        | <b>Aff.Mail</b>      | w/  |   |
|                          | <b>Aff.Pub.</b>      |   |   |
|                          | <b>Sp.Ntc.</b>       | <b>See petition for details.</b>  |   |
|                          | <b>Pers.Serv.</b>    |   |   |
|                          | <b>Conf. Screen</b>  |   |   |
|                          | <b>Letters</b>       |   |   |
|                          | <b>Duties/Supp</b>   |   |   |
|                          | <b>Objections</b>    |   |   |
|                          | <b>Video Receipt</b> |   |   |
|                          | <b>CI Report</b>     |   |   |
|                          | <b>9202</b>          |   |   |
|                          | <b>Order</b>         | X   |   |
|                          | <b>Aff. Posting</b>  |   |   |
|                          | <b>Status Rpt</b>    |   |   |
|                          | <b>UCCJEA</b>        |   |   |
|                          | <b>Citation</b>      |   |   |
|                          | <b>FTB Notice</b>    |   |   |
|                          |                      |   | <b>Reviewed by:</b> SEF   |
|                          |                      |   | <b>Reviewed on:</b> 4/22/16   |
|                          |                      |   | <b>Updates:</b> 4/25/16   |
|                          |                      |   | <b>Recommendation:</b>  |
|                          |                      |   | <b>File 7 -Garcia</b>   |





**First Account & Report of Successor Trustee of the Brooke Bertoldi Pooled Special Needs Trust; Petition to Settle Account; to Decrease Bond; and to Fix & Allow Trustee Fees and Attorney Fees & Costs**

|                           |               |  |  |
|---------------------------|---------------|--|--|
|                           |               | <b>HERB THOMAS</b> , Successor Trustee, is petitioner.   | <b>NEEDS/PROBLEMS/COMMENTS:</b><br><br>Continued from 3/23/16. Minute order states the Court needs clarification as stated in the examiner notes with regard to the fees. Counsel is to file a declaration at least two court days prior to 4/27/16. As of 4/22/16 the following issues remain:<br><br>1. Trust agreement allows a \$1,500.00 annual fee for trust administration. In addition the disbursement schedule includes monthly Trust Department fees totaling \$412.68 without additional explanation and Trust Account prep fee of \$143.75. It is unclear what the annual fee covers if the trust is also paying monthly fees for the administration of the trust. Court may require clarification. |
|                           |               | Account period: 11/18/14 – 11/30/15  |  |
| Cont. from 021716, 032316 |               | Accounting - \$114,708.16  |  |
| Aff.Sub.Wit.              |               | Beginning POH - \$ 51,005.26   |  |
| ✓                         | Verified      | Ending POH - \$ 43,833.34  |  |
| Inventory                 |               | Current Bond is \$129,000.00. Petition requests the bond be reduced to \$49,000.00 (o.k.)  |  |
| PTC                       |               |  |  |
| Not.Cred.                 |               |  |  |
| ✓                         | Notice of Hrg | Trustee - \$212.50 (1.7 hours @ \$125.00 per hour)   |  |
| ✓                         | Aff.Mail      | Trust Administration fees - \$2,056.43 (already paid)  |  |
| Aff.Pub.                  |               |  |  |
| Sp.Ntc.                   |               |  |  |
| Pers.Serv.                |               | Attorney - \$3,702.50 (per itemization and declaration. 11.70 hrs of paralegal time at \$150/hr and 6.7 hrs of attorney time at \$295/hr)  |  |
| Conf. Screen              |               |  |  |
| Letters                   |               |  |  |
| Duties/Supp               |               | Costs - \$416.11 (filing fees, FedEx)  |  |
| Objections                |               |  |  |
| Video Receipt             |               | Petitioner requests the authority to receive interim compensation going forward based on his current hourly rate, subject to Court confirmation, in an amount not to exceed \$1,000.00 annually. |  |
| CI Report                 |               |  |  |
| 9202                      |               |  |  |
| ✓                         | Order         |  |  |
| Aff. Posting              |               |  |  |
| Status Rpt                |               |  |  |
| UCCJEA                    |               |  |  |
| Citation                  |               |  |  |
| FTB Notice                |               |  |  |

Please see additional page

Reviewed by: KT

Reviewed on: 4/22/16

Updates:

Recommendation:

File 9A- Bertoldi

**Petitioner prays for an Order:**

1. Approving, allowing and settling the First Account and Report of Successor Trustee;
2. Make and order decreasing the bond to \$49,000.00;
3. Authorizing and directing payment to Herb Thomas trustees fees totaling \$212.50;
4. Authorizing Trustee to receive interim compensation going forward based on his hourly rate, and subject to Court confirmation, in an amount not to exceed \$1,000.00 annually;
5. Authorizing attorney fees of \$3,702.50 and costs of \$416.11.

**Note:** If the petition is granted, status hearings will be set as follows:

- **Wednesday, May 25, 2016** at 9:00 a.m. in Department 303, for the filing of the reduced bond.
- **Wednesday, February 28, 2018** at 9:00 a.m. in Department 303, for the filing of the second account of successor trustee.

Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.

**Probate Status Hearing re: Proof of Notice to DMV**

|  |  |   |   |
|--|--|---|---|
|  |  | <p><b>FREMONT BANK</b>, former Trustee, petitioned the court for approval of their first and final account.</p> <p><b>HERB THOMAS</b> is the current successor trustee.</p> <p>The first and final account showed that Fremont Bank as Trustee for the Trust purchased a handicap equipped van for the beneficiary and distributed the van directly to the beneficiary.</p> <p><b>Minute Order dated 6/29/15 states</b> the court orders that the DMV is to be noticed that the Trust shall be the lienholder for the vehicle. Counsel is to submit a declaration verified by Herb Thomas.</p> <p><b>Former Status Report filed on 11/25/15</b> states Charities Pooled Trust (CPT) has been attempting to secure a lien on the vehicle, however it may not do so until the DMV issues and Electronic Lien Title (ELT). The DMV has informed CPT that the ELT will not be available until January 2016. Once the ELT is received they will be able to place CPT as a lienholder on the vehicle.</p> | <p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Continued from 3/23/16. Minute order states</b> Counsel represents that the Trustee is waiting for the DMV to process the lien paperwork. Counsel is to bring paper proof of the lien for the 4/27/16 hearing.</p> <p>1. Need proof that the Trust is a lienholder on the vehicle or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p> |
| <b>Cont. from 080315, 083115, 113015, 031416, 032316</b> |  |   |   |
| <b>Aff.Sub.Wit.</b>                                      |  |   |   |
| <b>Verified</b>  |  |   |   |
| <b>Inventory</b>   |  |   |   |
| <b>PTC</b>   |  |   |   |
| <b>Not.Cred.</b>   |  |   |   |
| <b>Notice of Hrg</b>                                     |  |   |   |
| <b>Aff.Mail</b>  |  |   |   |
| <b>Aff.Pub.</b>  |  |   |   |
| <b>Sp.Ntc.</b>   |  |   |   |
| <b>Pers.Serv.</b>  |  |   |   |
| <b>Conf. Screen</b>                                      |  |   |   |
| <b>Letters</b>   |  |   |   |
| <b>Duties/Supp</b>                                       |  |   |   |
| <b>Objections</b>  |  |   |   |
| <b>Video Receipt</b>                                     |  | <p><b>Reviewed by:</b> KT</p> <p><b>Reviewed on:</b> 4/22/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 9B – Bertoldi</b></p>  |   |
| <b>CI Report</b>   |  |   |   |
| <b>9202</b>  |  |   |   |
| <b>Order</b>   |  |   |   |
| <b>Aff. Posting</b>                                      |  |   |   |
| <b>Status Rpt</b>  |  |   |   |
| <b>UCCJEA</b>  |  |   |   |
| <b>Citation</b>  |  |   |   |
| <b>FTB Notice</b>  |  |   |   |

|   |   |  |
|---|---|--|
| <b>DOD: 9/26/13</b>   | <p><b>LIANA M. WAITE</b>, Daughter, was appointed Administrator with Will Annexed with Full IAEA without bond on 7/15/14. Letters issued 7/17/14.</p> <p>At the hearing on 7/15/14, the Court set this status hearing re filing the first account or petition for final distribution.</p> <p><b>Status Report filed 4/20/16</b> incorporates the information set forth in the status report of 3/8/16 and further states: Attoreny Barbara A. Sena had several Workers' Compensation client cases which were pending at the time of her death. The Administrator notified the active clients of her passing and the cases have been transferred to the respective legal representatives accordingly. The Administrator has not acted as the legal representative for any of the decedent's clients.</p> <p>The Administrator has recently been advised that some of the workers' compensation client cases are nearing settlement, and therefore will pursue attorney liens on behalf of the estate once these cases have settled. These client cases, along with the federal and state tax liens and/or liabilities, must be resolved prior to preparation of a petition for final distribution.</p> | <p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>Minute Order 3/16/16; Ms. Waite represents that there are tax liabilities to resolve, and requests additional time.</b></p> <p><b>1. Need first account or petition for final distribution.</b></p> |
| <b>Cont. from 091615, 031616</b>  |   |  |
| <b>Aff.Sub.Wit.</b>   |   |  |
| <b>Verified</b>   |   |  |
| <b>Inventory</b>  |   |  |
| <b>PTC</b>  |   |  |
| <b>Not.Cred.</b>  |   |  |
| <b>Notice of Hrg</b>  |   |  |
| <b>Aff.Mail</b>   |   |  |
| <b>Aff.Pub.</b>   |   |  |
| <b>Sp.Ntc.</b>  |   |  |
| <b>Pers.Serv.</b>   |   |  |
| <b>Conf. Screen</b>   |   |  |
| <b>Letters</b>  |   |  |
| <b>Duties/Supp</b>  |   |  |
| <b>Objections</b>   |   |  |
| <b>Video Receipt</b>  |   |  |
| <b>CI Report</b>  |   |  |
| <b>9202</b>   |   |  |
| <b>Order</b>  |   |  |
| <b>Aff. Posting</b>   |   |  |
| <b>Status Rpt</b>   |   |  |
| <b>UCCJEA</b>   |   |  |
| <b>Citation</b>   |   |  |
| <b>FTB Notice</b>   |   |  |
| <p><b>Reviewed by:</b> skc</p> <p><b>Reviewed on:</b> 4/22/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 10 - Sena</b></p> |   |  |

Attorney Kenneth A. Baldwin (for Leonard C. Bacome, Executor)

**First and Final Report of Executor of Will and Petition for its Settlement, for Allowance of Executor's Statutory Commissions, Allowance of Attorneys' Statutory and Extraordinary Fees, and for Final Distribution of Estate Under Decedent's Will on Waiver of Account**

|                                     |                       |   |   |
|-------------------------------------|-----------------------|---|---|
| <b>DOD: 4/13/2014</b>               |                       | <b>LEONARD C. BACOME</b> , son and Executor, is Petitioner.   | <b>NEEDS/PROBLEMS/COMMENTS:</b>   |
|                                     |                       | Accounting is waived.   |   |
| <b>Cont. from</b>                   |                       | I & A — <b>\$201,672.37</b>   | <p>1. Local Rule 7.17(B) specifies certain expenses which are considered by the Court to be part of doing business, and are therefore not reimbursable costs or fees. Local Rule 7.17 does not differentiate between ordinary costs vs. extraordinary costs. Paragraph 17 of the Petition contains an itemization of "extraordinary" costs which includes the following non-reimbursable fees pursuant to Local Rule 7.17(B)(7), for Court Runner services totaling <b>\$313.10</b>. Court may require the proposed order to be interlineated to deduct the following costs from the amount of allowable costs, and to increase the cash distribution:</p> <ul style="list-style-type: none"> <li>• Process server fee: <b>\$91.25</b>;</li> <li>• Deliver documents: <b>\$71.50</b>;</li> <li>• Filing fees and research fees: <b>\$150.35</b>.</li> </ul> |
| <input type="checkbox"/>            | <b>Aff.Sub.Wit.</b>   | POH — <b>\$149,148.25</b><br>(all cash)   |   |
| <input checked="" type="checkbox"/> | <b>Verified</b>       |   |   |
| <input checked="" type="checkbox"/> | <b>Inventory</b>      | Executor — <b>\$6,550.00</b><br>(statutory)   |   |
| <input checked="" type="checkbox"/> | <b>PTC</b>            |   |   |
| <input checked="" type="checkbox"/> | <b>Not.Cred.</b>      | Attorney — <b>\$6,550.00</b><br>(statutory)   |   |
| <input checked="" type="checkbox"/> | <b>Notice of Hrg</b>  |   |   |
| <input checked="" type="checkbox"/> | <b>Aff.Mail</b>       | Attorney X/O — <b>\$9,596.50</b><br>(Itemized at Exhibits I and II; for 18.3 hours for services pertaining to converting Notes and Deeds of Trust to real property ownership interest; for 38 hours for settlement attempts, eviction proceedings of tenants in estate real property to enable sale and distribution of assets; @ \$170/hour, \$250/hour and \$350/hour attorney rates; \$125/hour and \$160/hour paralegal rates;) |   |
|                                     | <b>Aff.Pub.</b>       |   |   |
|                                     | <b>Sp.Ntc.</b>        |   |   |
|                                     | <b>Pers.Serv.</b>     |   |   |
| <input checked="" type="checkbox"/> | <b>Dec. Trustee</b>   |   |   |
|                                     | <b>Letters</b> 051315 |   |   |
|                                     | <b>Duties/Supp</b>    |   |   |
|                                     | <b>Objections</b>     |   |   |
|                                     | <b>Video Receipt</b>  | Costs — <b>[\$1,946.60 or \$1,633.50]</b><br>(filing fees including unlawful detainer, publication, certified copies; includes "extraordinary" costs for runner services;)  |   |
| <input checked="" type="checkbox"/> | <b>CI Report</b>      |   |   |
| <input checked="" type="checkbox"/> | <b>9202</b>           |   |   |
| <input checked="" type="checkbox"/> | <b>Order</b>          |   |   |
|                                     | <b>Aff. Posting</b>   |   |   |
|                                     | <b>Status Rpt</b>     |   |   |
|                                     | <b>UCCJEA</b>         |   |   |
|                                     | <b>Citation</b>       |   |   |
| <input checked="" type="checkbox"/> | <b>FTB Notice</b>     | <b>Distribution pursuant to Decedent's Will is to:</b><br><br><b>LEONARD C. BACOME</b> , as Trustee of the <b>HAZEL M. BACOME LIVING TRUST</b> – <b>[\$124,505.15 or \$124,818.25] cash.</b>  |   |
|                                     |                       |   | <b>Reviewed by:</b> LEG   |
|                                     |                       |   | <b>Reviewed on:</b> 4/25/16   |
|                                     |                       |   | <b>Updates:</b>   |
|                                     |                       |   | <b>Recommendation:</b>  |
|                                     |                       |   | <b>File 11- Bacome</b>  |

**Petitioner Penny Sabanovich's Notice of Motion and Motion to Enforce July 24, 2015 Order and Clarification of Visitation Stipulation and Order**

|                             |                      |  |  |
|-----------------------------|----------------------|--|--|
|                             |                      | <b>PENNY SABANOVICH</b> , Maternal Grandmother, and former temporary guardian, is Movant.<br><br><p align="center"><b>See pleadings for details.</b></p> | <b>NEEDS/PROBLEMS/COMMENTS:</b><br><br><b>Minute Order 3/9/16:</b> This matter is continued for written objections to be filed. Said objections are to be filed and served by 3/30/16 and any replies are due by 4/13/16. The Court reserves the issue of Mr. Clark paying the attorney's fees.<br><br><b>The following issue remains noted:</b><br><br>1. <b>Probate Code §1602 states</b> while a parent has custody, proceedings for modification of visitation orders made upon termination of a guardianship shall be determined in a proceeding under the Family Code. If no custody case exists in any county, the visitation order may be used as the basis for opening a case in the county in which the custodial parent resides.<br><br>Carl Clark, the custodial parent, and the minor reside in Salinas, which is Monterey County.<br><br>Need clarification re whether any family law case is currently existing in any other jurisdiction, and further authority re jurisdiction to make further orders re enforcement or clarification of this order in the Fresno Superior Court Probate Court. Ms. Sabanovich may be required to either seek joinder to an existing Family Law case, or open a new case in Monterey County, as applicable.<br><br><u>Note:</u> Petitioner continues to cite Probate Code §2630; however, this section pertains to jurisdiction re settling accounts on termination guardianship of the <u>estate</u> and does not apply in this situation. |
| <b>Cont. from 030916</b>    |                      |  |  |
|                             | <b>Aff.Sub.Wit.</b>  |  |  |
| ✓                           | <b>Verified</b>      |  |  |
|                             | <b>Inventory</b>     |  |  |
|                             | <b>PTC</b>           |  |  |
|                             | <b>Not.Cred.</b>     |  |  |
| ✓                           | <b>Notice of Hrg</b> |  |  |
| ✓                           | <b>Aff.Mail</b>      | W  |  |
|                             | <b>Aff.Pub.</b>      |  |  |
|                             | <b>Sp.Ntc.</b>       |  |  |
|                             | <b>Pers.Serv.</b>    |  |  |
|                             | <b>Conf. Screen</b>  |  |  |
|                             | <b>Letters</b>       |  |  |
|                             | <b>Duties/Supp</b>   |  |  |
|                             | <b>Objections</b>    |  |  |
|                             | <b>Video Receipt</b> |  |  |
|                             | <b>CI Report</b>     |  |  |
|                             | <b>9202</b>          |  |  |
| ✓                           | <b>Order</b>         |  |  |
|                             | <b>Aff. Posting</b>  |  |  |
|                             | <b>Status Rpt</b>    |  |  |
|                             | <b>UCCJEA</b>        |  |  |
|                             | <b>Citation</b>      |  |  |
|                             | <b>FTB Notice</b>    |  |  |
| <b>Reviewed by:</b> skc     |                      |  |  |
| <b>Reviewed on:</b> 4/22/16 |                      |  |  |
| <b>Updates:</b>             |                      |  |  |
| <b>Recommendation:</b>      |                      |  |  |
| <b>File 12- Clark</b>       |                      |  |  |

Petitioner: Carol Jean Steinhauer (Pro per – Non-relative)

## Petition for Appointment of Guardian of the Person

|                                     |               |  |  |
|-------------------------------------|---------------|--|--|
|                                     |               | <b>TEMPORARY EXPIRES 4/27/16</b>                       | <b>NEEDS/PROBLEMS/COMMENTS:</b>  |
|                                     |               | <b>CAROL STEINHAUER</b> , non-relative, is petitioner. | <b>Minute order dated 3/7/16 (temporary hearing) states</b> mom must be personally served for general hearing. <b>Court orders there shall be no visits for either parent until they appear before the Court.</b>  |
| Cont. from                          |               | DSS Social Worker report filed 4/21/16.                |  |
| <input type="checkbox"/>            | Aff.Sub.Wit.  |  |  |
| <input checked="" type="checkbox"/> | Verified      |  |  |
| <input type="checkbox"/>            | Inventory     |  |  |
| <input type="checkbox"/>            | PTC           |  |  |
| <input type="checkbox"/>            | Not.Cred.     |  |  |
| <input type="checkbox"/>            | Notice of Hrg | X  |  |
| <input type="checkbox"/>            | Aff.Mail      | X  |  |
| <input type="checkbox"/>            | Aff.Pub.      |  |  |
| <input type="checkbox"/>            | Sp.Ntc.       |  |  |
| <input type="checkbox"/>            | Pers.Serv.    | X  |  |
| <input checked="" type="checkbox"/> | Conf. Screen  |  |  |
| <input checked="" type="checkbox"/> | Letters       |  |  |
| <input checked="" type="checkbox"/> | Duties/Supp   |  |  |
| <input type="checkbox"/>            | Objections    |  |  |
| <input type="checkbox"/>            | Video Receipt |  |  |
| <input checked="" type="checkbox"/> | DSS Report    |  |  |
| <input type="checkbox"/>            | 9202          |  |  |
| <input checked="" type="checkbox"/> | Order         |  |  |
| <input type="checkbox"/>            | Aff. Posting  |  |  |
| <input type="checkbox"/>            | Status Rpt    |  |  |
| <input checked="" type="checkbox"/> | UCCJEA        |  |  |
| <input type="checkbox"/>            | Citation      |  |  |
| <input type="checkbox"/>            | FTB Notice    |  |  |
|                                     |               |  | 1. Petitioner requests to be excused from notice to father and mother of minor. If court does not excuse notice need proof of personal service 15 days prior to hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consents and waivers of notice for:<br>a. Father<br>b. Jamie Matney (mother) |
|                                     |               |  | 2. UCCJEA form does not list minor's residence information for the period of March 2011 through February 2015.   |
|                                     |               |  | <b>Reviewed by:</b> SEF  |
|                                     |               |  | <b>Reviewed on:</b> 4/22/2016  |
|                                     |               |  | <b>Updates:</b> 4/25/2016  |
|                                     |               |  | <b>Recommendation:</b>   |
|                                     |               |  | <b>File 13- Matney</b>   |

Probate Status Hearing Re: Proof of Funds deposited into blocked account

|                   |  |   |
|-------------------|--|---|
| DOD: 6/18/15      |  | <b>NEEDS/PROBLEMS/COMMENTS:</b><br><br><b><u>OFF CALENDAR</u></b><br><br>Receipt for blocked account was filed 4/4/16 |
|                   |  |   |
|                   |  |   |
|                   |  |   |
| Cont. from 033016 |  |   |
| Aff.Sub.Wit.      |  |   |
| Verified          |  |   |
| Inventory         |  |   |
| PTC               |  |   |
| Not.Cred.         |  |   |
| Notice of Hrg     |  |   |
| Aff.Mail          |  |   |
| Aff.Pub.          |  |   |
| Sp.Ntc.           |  |   |
| Pers.Serv.        |  |   |
| Conf. Screen      |  |   |
| Letters           |  |   |
| Duties/Supp       |  |   |
| Objections        |  |   |
| Video Receipt     |  |   |
| CI Report         |  |   |
| 9202              |  |   |
| Order             |  |   |
| Aff. Posting      |  |   |
| Status Rpt        |  |   |
| UCCJEA            |  |   |
| Citation          |  |   |
| FTB Notice        |  |   |
|                   |  | Reviewed by: skc  |
|                   |  | Reviewed on: 4/21/16  |
|                   |  | Updates:  |
|                   |  | Recommendation:   |
|                   |  | File 14- Clark  |



**15 Leann Moreno and Leo Moreno IV (GUARD/P) Case No. 16CEPR00041**

Petitioner: Efrain Palma (Pro per – Maternal step-grandfather)

**Petition for Appointment of Guardian of the Person (as to LEANN MORENO only)**

| NO TEMPORARY REQUESTED                                 |                           | NEEDS/PROBLEMS/COMMENTS:   |
|--|---------------------------|--|
| EFRAIN PALMA, maternal step-grandfather, is petitioner |                           | Petition is as to <u>LEANN MORENO</u> only.  |
| Court Investigator report filed 3/9/2015.              |                           | <b>NOTE:</b> Petitioner filed a separate petition for guardianship of Leo Moreno IV that is set for 5/31/16. |
| Cont. from 031616                                      |                           |  |
| <input type="checkbox"/> Aff.Sub.Wit.                  |                           |  |
| <input checked="" type="checkbox"/> Verified           |                           |  |
| <input type="checkbox"/> Inventory                     | See petition for details. |  |
| <input type="checkbox"/> PTC                           |                           |  |
| <input type="checkbox"/> Not.Cred.                     |                           |  |
| <input checked="" type="checkbox"/> Notice of Hrg      |                           |  |
| <input checked="" type="checkbox"/> Aff.Mail           |                           |  |
| <input type="checkbox"/> Aff.Pub.                      |                           |  |
| <input type="checkbox"/> Sp.Ntc.                       |                           |  |
| <input type="checkbox"/> Pers.Serv.                    |                           |  |
| <input checked="" type="checkbox"/> Conf. Screen       |                           |  |
| <input checked="" type="checkbox"/> Letters            |                           |  |
| <input checked="" type="checkbox"/> Duties/Supp        |                           |  |
| <input type="checkbox"/> Objections                    |                           |  |
| <input type="checkbox"/> Video Receipt                 |                           |  |
| <input checked="" type="checkbox"/> CI Report          |                           |  |
| <input type="checkbox"/> 9202                          |                           |  |
| <input checked="" type="checkbox"/> Order              |                           |  |
| <input type="checkbox"/> Aff. Posting                  |                           |  |
| <input type="checkbox"/> Status Rpt                    |                           |  |
| <input checked="" type="checkbox"/> UCCJEA             |                           |  |
| <input type="checkbox"/> Citation                      |                           |  |
| <input type="checkbox"/> FTB Notice                    |                           |  |
|  |                           | Reviewed by: SEF   |
|  |                           | Reviewed on: 4/22/2016   |
|  |                           | Updates:   |
|  |                           | Recommendation:  |
|  |                           | File 15- Moreno  |

15

Petitioner: Mariah Jovita Hernandez – Minor/Proposed Ward (Pro Per)

## Petition for Appointment of Guardian of the Person

TEMPORARY EXPIRES 4/27/2016

**MARIAH HERNANDEZ**, minor/proposed ward, is petitioner and requests **EILEEN GARCIA**, maternal grandmother, be appointed guardian.

**EILEEN GARCIA** – Maternal grandmother/-proposed guardian - *consents to appointment 11/12/2015*

**Court Investigator report filed 3/3/2016.**

*See petition for details.*

## NEEDS/PROBLEMS/COMMENTS

**Continued from 3/16/16.**

**Minute order states** mother waives notice in open court. The Court directs Ruben Hernandez (father) to go to clerk's office forthwith and provide his contact information to the investigator. Father represents that the minor has Native American ancestry. Any written objections are to be filed and properly served by 4/12/16. The Court grants temporary orders without prejudice to preserve the status quo; Letters are to issue forthwith.

**Reviewed by:** SEF

**Reviewed on:** 4/22/2016

**Updates:**

**Recommendation:**

**File 16- Hernandez**

|                   |               |    |
|-------------------|---------------|----|
|                   |               |    |
|                   |               |    |
|                   |               |    |
|                   |               |    |
| Cont. from 031616 |               |    |
|                   | Aff.Sub.Wit.  |    |
| ✓                 | Verified      |    |
|                   | Inventory     |    |
|                   | PTC           |    |
|                   | Not.Cred.     |    |
| ✓                 | Notice of Hrg |    |
| ✓                 | Aff.Mail      | w/ |
|                   | Aff.Pub.      |    |
|                   | Sp.Ntc.       |    |
|                   | Pers.Serv.    | x  |
| ✓                 | Conf. Screen  |    |
| ✓                 | Letters       |    |
| ✓                 | Duties/Supp   |    |
|                   | Objections    |    |
|                   | Video Receipt |    |
| ✓                 | CI Report     |    |
|                   | 9202          |    |
| ✓                 | Order         |    |
|                   | Aff. Posting  |    |
|                   | Status Rpt    |    |
| ✓                 | UCCJEA        |    |
|                   | Citation      |    |
|                   | FTB Notice    |    |

**Corrected Petition for Probate of Will and for Letters of Administration with Will Annexed and Authorization to Administer under the IAEA**

|                      |                      |   |   |   |
|----------------------|----------------------|---|---|---|
| <b>DOD: 11/12/15</b> |                      |   | <b>DENNIS V. YATES</b> is Petitioner and requests appointment as Administrator with Will Annexed with bond of \$950,000.00. (Bond filed 4/18/16.) | <b>NEEDS/PROBLEMS/COMMENTS:</b>   |
|                      |                      |   |   |   |
| <b>Cont. from</b>    |                      |   | Petitioner is a resident of Plantersville, TX.  | <b>Note:</b> Petitioner Dennis V. Yates is the Successor Trustee of the Matlock Living Trust, which is the beneficiary of this estate.  |
| S/P                  | <b>Aff.Sub.Wit.</b>  |   |   |   |
| ✓                    | <b>Verified</b>      |   | Full IAEA – ok  | 1. <del>Need declination to act from named alternate executor</del><br><b>Connie Rae Hall.</b>  |
|                      | <b>Inventory</b>     |   |   |   |
|                      | <b>PTC</b>           |   | Will dated 5/16/03<br>1 <sup>st</sup> Codicil dated 9/26/03   | <b>Note:</b> If granted, the Court will set status hearings as follows:   |
|                      | <b>Not.Cred.</b>     |   |   |   |
| ✓                    | <b>Notice of Hrg</b> |   | Residence: Sanger, CA<br>Publication: Business Journal  | <ul style="list-style-type: none"> <li>Wednesday, September 28, 2016 for filing Inventory and Appraisal</li> <li>Wednesday, July 26, 2017 for filing the first or final account.</li> </ul> |
| ✓                    | <b>Aff.Mail</b>      | W |   |   |
| ✓                    | <b>Aff.Pub.</b>      |   | Estimated value of estate:<br>Personal property: \$900,000.00<br>Annual income: \$9,000.00<br>Real property: \$35,000.00<br>Total: \$944,000.00   |   |
|                      | <b>Sp.Ntc.</b>       |   |   |   |
|                      | <b>Pers.Serv.</b>    |   | Probate Referee: Rick Smith   |   |
|                      | <b>Conf. Screen</b>  |   |   |   |
| ✓                    | <b>Letters</b>       |   |   |   |
| ✓                    | <b>Duties/Supp</b>   |   |   |   |
|                      | <b>Objections</b>    |   |   |   |
|                      | <b>Video Receipt</b> |   |   |   |
|                      | <b>CI Report</b>     |   |   |   |
|                      | <b>9202</b>          |   |   |   |
| ✓                    | <b>Order</b>         |   |   |   |
|                      | <b>Aff. Posting</b>  |   |   |   |
|                      | <b>Status Rpt</b>    |   |   |   |
|                      | <b>UCCJEA</b>        |   |   |   |
|                      | <b>Citation</b>      |   |   |   |
|                      | <b>FTB Notice</b>    |   |   |   |

|                                  |
|----------------------------------|
| <b>Reviewed by:</b> skc          |
| <b>Reviewed on:</b> 4/25/16      |
| <b>Updates:</b>                  |
| <b>Recommendation:</b> SUBMITTED |
| <b>File</b> 17- Matlock          |

|                          |                      |   |   |
|--------------------------|----------------------|---|---|
| <b>DOD: 10/11/2014</b>   |                      | <b>CLEO APPLE</b> , surviving spouse, is petitioner.  | <b>NEEDS/PROBLEMS/COMMENTS:</b>   |
|                          |                      | No other proceedings.   |   |
|                          |                      | Will dated 06/12/2000 devises the real property to the Vern and Cleo Apple 2000 Revocable Trust.  | <b>Minute Order of 03/30/2016: Counsel is to file a declaration verified by his client with regard to the issues raised in the examiner notes.</b>  |
| <b>Cont. from 033016</b> |                      |   |   |
|                          | <b>Aff.Sub.Wit.</b>  |   | <ol style="list-style-type: none"> <li>The will devises the property in question to the Vern and Cleo Apple 2000 Revocable Trust not the surviving spouse/petitioner therefore this procedure cannot be used.</li> <li>Declaration filed 04/08/2016 states Quitclaim deed dated June 12, 2000, attached as Exhibit A; Quitclaim deed dated May 8, 2008, attached as Exhibit B; and Quitclaim deed dated November 5, attached as Exhibit C; are attached however neither of the Quitclaim deeds were attached as exhibits to the declaration.</li> </ol> |
| ✓                        | <b>Verified</b>      |   |   |
|                          | <b>Inventory</b>     |   |   |
|                          | <b>PTC</b>           |   |   |
|                          | <b>Not.Cred.</b>     |   |   |
| ✓                        | <b>Notice of Hrg</b> |   |   |
| ✓                        | <b>Aff.Mail</b>      | w/  |   |
|                          | <b>Aff.Pub.</b>      |   |   |
|                          | <b>Sp.Ntc.</b>       |   |   |
|                          | <b>Pers.Serv.</b>    |   |   |
|                          | <b>Conf. Screen</b>  |   |   |
|                          | <b>Letters</b>       |   |   |
|                          | <b>Duties/Supp</b>   |   |   |
|                          | <b>Objections</b>    |   |   |
|                          | <b>Video Receipt</b> |   |   |
|                          | <b>CI Report</b>     |   |   |
|                          | <b>9202</b>          |   |   |
| ✓                        | <b>Order</b>         |   |   |
|                          | <b>Aff. Posting</b>  |   |   |
|                          | <b>Status Rpt</b>    |   |   |
|                          | <b>UCCJEA</b>        |   |   |
|                          | <b>Citation</b>      |   |   |
|                          | <b>FTB Notice</b>    | <p><b>Declaration of Petitioner Cleo Apple in Support of Spousal Property Petition and Real Property Chain of Title filed 04/08/2016</b> states on June 12, 2000, decedent and petitioner established the Vern and Cleo Apple 2000 Revocable Trust, as a revocable grantor trust. Prior to establishing the Trust, decedent and petitioner owned the property commonly known as 576 E. Polk St. Coalinga, and more particularly described at on attachments 7a and 7b of the petition. Pursuant to Quitclaim Deed dated June 12, 2000, and recorded on June 19, 2000, as Document No. 2000-0073072, in Official Records of Fresno County, attached hereto as Exhibit A is a copy of the Quitclaim Deed. Decedent and Petitioner, for no monetary consideration had quitclaimed their interest in the Property to the Trust.</p> <p>In 2008, in order to provide financial accommodations for their grandson, Ernest Kalilimoku Apple, also known as Ernie Apple (herein Ernie), decedent and petitioner, transferred one third (1/3<sup>rd</sup>) interest in the Property to Ernie, by Quitclaim Deed dated May 8, 2008, and recorded on May 13, 2008, as Document No. 2008-0069768, in Official Records of Fresno County, attached hereto as Exhibit B is a copy of the Quitclaim Deed, and a two thirds (2/3<sup>rd</sup>) interest was retained by the Trust.</p> <p><b><u>Please see additional page</u></b></p> | <b>Reviewed by:</b> LV<br><b>Reviewed on:</b> 04/25/2016<br><b>Updates:</b><br><b>Recommendation:</b><br><b>File 18- Apple</b>  |

Ernie indicated a tenant in common as to a one third ( $1/3^{\text{rd}}$ ) interest. The effect of the tenancy in common was to give Ernie an estate of inheritance to support a financing condition in the startup of a new business.

Seven months later, in December 2008, the lender Ernie was obtaining financing from established an escrow with Fidelity National Title Company, and insisted upon removing any reference to the Trust. On November 5, 2008, Ernie, decedent and petitioner as Trustees, executed a Grant Deed, recorded December 12, 2008, as Document No. 2008-0169921, in Official Records of Fresno County, attached hereto as Exhibit C is a copy of the Grant Deed under which decedent and petitioner, husband and wife, as community property, became vested with a two thirds ( $2/3^{\text{rd}}$ ) interest in the Property as tenants in common. The remaining one third ( $1/3^{\text{rd}}$ ) interest was retained by Ernie as to a one third ( $1/3^{\text{rd}}$ ) interest as tenant in common.

At the time Fidelity National Title required the two thirds ( $2/3^{\text{rd}}$ ) interest in the property be removed from the trust, petitioner was present when decedent stated their mutual reluctance to do so, because they had been told by the attorney who assisted in preparation of the Trust that unless real property was in the Trust it would be subject to Probate. Decedent and Petitioner were told by the lender's representative and the title company's representative that it would not make a difference and the property would be transferred to the survivor automatically because they would define the property as community property and community property was not subject to probate. Since Decedent and Petitioner had explained to them, by persons they believed to be knowledgeable of such matters, they believed that the property would not be subject to the Will or the Trust and executed the deed prepared for them.

The petition seeks a determination that the Decedent's interest in the property passed to petitioner as spousal property, characterized as community property of Decedent and petitioner at the time of Decedent's death, and not subject to the "pour over" provisions of Decedent's Will, as petitioner had believed would be the outcome.

**19 Aubrie Church (GUARD/P)****Case No. 16CEPR00204**Petitioner: Anissa Kay Lotspeich (Pro per – 2<sup>nd</sup> Cousin)Petitioner: Lori Lotspeich Ingram (Pro per – 2<sup>nd</sup> Cousin)

Objector: Adam Anaya (Pro per - Father)

**Petition for Appointment of Guardian of the Person (Initial)**

|                                     |                      |    |  |   |
|-------------------------------------|----------------------|----|--|---|
|                                     |                      |    | <b><u>TEMPORARY EXPIRES 4/27/16</u></b>  | <b>NEEDS/PROBLEMS/COMMENTS:</b>   |
|                                     |                      |    | <b>LORI LOTSPEICH INGRAM and ANISSA LOTSPEICH</b> , second cousins, are petitioners. | <b>Minute order dated 3/8/16 states</b> Adam Anaya (father) is to properly serve his filed objections or the Court will strike them and not consider them. Court orders no visitation for Marci Henson (mother) until she appears before the Court. The Court orders supervised visitation as mutually agreed by all parties for Adam Anaya.<br><br><b>Petitioners:</b><br>1. Petitioners request to be excused from giving notice to Mike Church (maternal grandfather). If court does not excuse notice, need proof of mailed service 15 days before the hearing of the <i>Notice of Hearing</i> with a copy of the petition <u>or</u> consent and waiver of notice on Mike Church.<br><br><b>Objector:</b><br>1. Objections were served on petitioners and mother. However, it is unclear which objection(s) were served as father filed objections on both 3/4/16 or 3/18/16. |
|                                     |                      |    |  |   |
| <b>Cont. from</b>                   |                      |    | <b>Objections of Father Adam Anaya filed 3/4/16.</b>                                 |   |
| <input type="checkbox"/>            | <b>Aff.Sub.Wit.</b>  |    |  |   |
| <input checked="" type="checkbox"/> | <b>Verified</b>      |    | <b>Objections of Father Adam Anaya filed 3/19/16.</b>                                |   |
| <input type="checkbox"/>            | <b>Inventory</b>     |    |  |   |
| <input type="checkbox"/>            | <b>PTC</b>           |    |  |   |
| <input type="checkbox"/>            | <b>Not.Cred.</b>     |    | <b>Court Investigator report filed 4/27/16.</b>                                      |   |
| <input checked="" type="checkbox"/> | <b>Notice of Hrg</b> |    |  |   |
| <input checked="" type="checkbox"/> | <b>Aff.Mail</b>      | w/ |  |   |
| <input type="checkbox"/>            | <b>Aff.Pub.</b>      |    | <b>See petition for details.</b>   |   |
| <input type="checkbox"/>            | <b>Sp.Ntc.</b>       |    |  |   |
| <input checked="" type="checkbox"/> | <b>Pers.Serv.</b>    | w/ |  |   |
| <input checked="" type="checkbox"/> | <b>Conf. Screen</b>  |    |  |   |
| <input checked="" type="checkbox"/> | <b>Letters</b>       |    |  |   |
| <input checked="" type="checkbox"/> | <b>Duties/Supp</b>   |    |  |   |
| <input checked="" type="checkbox"/> | <b>Objections</b>    | w/ |  |   |
| <input type="checkbox"/>            | <b>Video Receipt</b> |    |  |   |
| <input checked="" type="checkbox"/> | <b>CI Report</b>     |    |  |   |
| <input type="checkbox"/>            | <b>9202</b>          |    |  |   |
| <input checked="" type="checkbox"/> | <b>Order</b>         |    |  |   |
| <input type="checkbox"/>            | <b>Aff. Posting</b>  |    |  |   |
| <input type="checkbox"/>            | <b>Status Rpt</b>    |    |  |   |
| <input checked="" type="checkbox"/> | <b>UCCJEA</b>        |    |  |   |
| <input type="checkbox"/>            | <b>Citation</b>      |    |  |   |
| <input type="checkbox"/>            | <b>FTB Notice</b>    |    |  |   |
|                                     |                      |    |  | <b>Reviewed by:</b> SEF   |
|                                     |                      |    |  | <b>Reviewed on:</b> 4/25/16   |
|                                     |                      |    |  | <b>Updates:</b>   |
|                                     |                      |    |  | <b>Recommendation:</b>  |
|                                     |                      |    |  | <b>File 19- Church</b>  |

**Petition to Appoint Successor Trustee**

|                                     |               |                          |  |                                 |
|-------------------------------------|---------------|--------------------------|--|---------------------------------|
|                                     |               |                          | <b>MARLON D. SERIMIAN</b> , Beneficiary, is Petitioner.<br><br>See petition for details. | <b>NEEDS/PROBLEMS/COMMENTS:</b> |
|                                     |               |                          |  |                                 |
|                                     |               |                          |  |                                 |
|                                     |               |                          |  |                                 |
|                                     |               |                          |  |                                 |
|                                     |               |                          |  |                                 |
| <input type="checkbox"/>            | Aff.Sub.Wit.  | <input type="checkbox"/> |  |                                 |
| <input checked="" type="checkbox"/> | Verified      | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | Inventory     | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | PTC           | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | Not.Cred.     | <input type="checkbox"/> |  |                                 |
| <input checked="" type="checkbox"/> | Notice of Hrg | <input type="checkbox"/> |  |                                 |
| <input checked="" type="checkbox"/> | Aff.Mail      | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | Aff.Pub.      | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | Sp.Ntc.       | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | Pers.Serv.    | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | Conf. Screen  | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | Letters       | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | Duties/Supp   | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | Objections    | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | Video Receipt | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | CI Report     | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | 9202          | <input type="checkbox"/> |  |                                 |
| <input checked="" type="checkbox"/> | Order         | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | Aff. Posting  | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | Status Rpt    | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | UCCJEA        | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | Citation      | <input type="checkbox"/> |  |                                 |
| <input type="checkbox"/>            | FTB Notice    | <input type="checkbox"/> |  |                                 |
|                                     |               |                          | Reviewed by: skc   |                                 |
|                                     |               |                          | Reviewed on: 4/25/16   |                                 |
|                                     |               |                          | Updates:   |                                 |
|                                     |               |                          | Recommendation:  |                                 |
|                                     |               |                          | File 20- Serimian  |                                 |

**Petition to Appoint Successor Trustee**

|                                     |               |                          |   |                                 |
|-------------------------------------|---------------|--------------------------|---|---------------------------------|
|                                     |               |                          | <b>DAVID M. SERIMIAN</b> , Beneficiary, is Petitioner.<br><br>See petition for details. | <b>NEEDS/PROBLEMS/COMMENTS:</b> |
|                                     |               |                          |   |                                 |
|                                     |               |                          |   |                                 |
|                                     |               |                          |   |                                 |
|                                     |               |                          |   |                                 |
|                                     |               |                          |   |                                 |
| <input type="checkbox"/>            | Aff.Sub.Wit.  | <input type="checkbox"/> |   |                                 |
| <input checked="" type="checkbox"/> | Verified      | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | Inventory     | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | PTC           | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | Not.Cred.     | <input type="checkbox"/> |   |                                 |
| <input checked="" type="checkbox"/> | Notice of Hrg | <input type="checkbox"/> |   |                                 |
| <input checked="" type="checkbox"/> | Aff.Mail      | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | Aff.Pub.      | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | Sp.Ntc.       | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | Pers.Serv.    | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | Conf. Screen  | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | Letters       | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | Duties/Supp   | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | Objections    | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | Video Receipt | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | CI Report     | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | 9202          | <input type="checkbox"/> |   |                                 |
| <input checked="" type="checkbox"/> | Order         | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | Aff. Posting  | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | Status Rpt    | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | UCCJEA        | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | Citation      | <input type="checkbox"/> |   |                                 |
| <input type="checkbox"/>            | FTB Notice    | <input type="checkbox"/> |   |                                 |
|                                     |               |                          | Reviewed by: skc  |                                 |
|                                     |               |                          | Reviewed on: 4/25/16  |                                 |
|                                     |               |                          | Updates:  |                                 |
|                                     |               |                          | Recommendation:   |                                 |
|                                     |               |                          | File 21- Serimian   |                                 |



Petition for Appointment of Temporary Guardian of the Person

|                   |                           |   |  |
|-------------------|---------------------------|---|--|
|                   | See petition for details. |   | NEEDS/PROBLEMS/COMMENTS:<br><br>Continued from 3/22/16. All notice issues for the temporary hearing have now been cured (mother served 3/30/16). |
|                   |                           |   |  |
|                   |                           |   |  |
|                   |                           |   |  |
| Cont. from 032216 |                           |   |  |
|                   | Aff.Sub.Wit.              |   |  |
| ✓                 | Verified                  |   |  |
|                   | Inventory                 |   |  |
|                   | PTC                       |   |  |
|                   | Not.Cred.                 |   |  |
| ✓                 | Notice of Hrg             |   |  |
|                   | Aff.Mail                  |   |  |
|                   | Aff.Pub.                  |   |  |
|                   | Sp.Ntc.                   |   |  |
| ✓                 | Pers.Serv.                | W |  |
| ✓                 | Conf. Screen              |   |  |
| ✓                 | Letters                   |   |  |
| ✓                 | Duties/Supp               |   |  |
|                   | Objections                |   |  |
|                   | Video Receipt             |   |  |
|                   | CI Report                 |   |  |
|                   | 9202                      |   |  |
| ✓                 | Order                     |   |  |
|                   | Aff. Posting              |   |  |
|                   | Status Rpt                |   |  |
| ✓                 | UCCJEA                    |   |  |
|                   | Citation                  |   |  |
|                   | FTB Notice                |   |  |
|                   |                           |   | Reviewed by: skC   |
|                   |                           |   | Reviewed on: 4/21/16   |
|                   |                           |   | Updates:   |
|                   |                           |   | Recommendation:  |
|                   |                           |   | File 22- Secoy   |

Petition for Letters of Administration; Authorization to Administer Under the IAEA

|                                     |                      |  |   |
|-------------------------------------|----------------------|--|---|
| <b>DOD: 6/9/11</b>                  |                      | <b>LORRIE EMERSON</b> , daughter, is Petitioner and requests appointment as Administrator with Full IAEA without bond.<br><br>All heirs waive bond.<br><br>Full IAEA – ok<br><br>Decedent died intestate<br><br>Residence: Fresno<br>Publication: Business Journal<br><br>Estimated value of estate:<br>Real property: \$250,000.00<br><br>Probate Referee: Steven Diebert | <b>NEEDS/PROBLEMS/COMMENTS:</b><br><br><u>Note:</u> The Court will set status hearings as follows:<br><br><ul style="list-style-type: none"> <li>Wednesday, September 28, 2016 for filing Inventory and Appraisal</li> <li>Wednesday, July 26, 2017 for filing the first or final account.</li> </ul> |
|                                     |                      |  |   |
|                                     |                      |  |   |
|                                     |                      |  |   |
| <b>Cont. from</b>                   |                      |  |   |
| <input type="checkbox"/>            | <b>Aff.Sub.Wit.</b>  |  |   |
| <input checked="" type="checkbox"/> | <b>Verified</b>      |  |   |
| <input type="checkbox"/>            | <b>Inventory</b>     |  |   |
| <input type="checkbox"/>            | <b>PTC</b>           |  |   |
| <input type="checkbox"/>            | <b>Not.Cred.</b>     |  |   |
| <input checked="" type="checkbox"/> | <b>Notice of Hrg</b> |  |   |
| <input checked="" type="checkbox"/> | <b>Aff.Mail</b>      |  |   |
| <input checked="" type="checkbox"/> | <b>Aff.Pub.</b>      |  |   |
| <input type="checkbox"/>            | <b>Sp.Ntc.</b>       |  |   |
| <input type="checkbox"/>            | <b>Pers.Serv.</b>    |  |   |
| <input type="checkbox"/>            | <b>Conf. Screen</b>  |  |   |
| <input checked="" type="checkbox"/> | <b>Letters</b>       |  |   |
| <input checked="" type="checkbox"/> | <b>Duties/Supp</b>   |  |   |
| <input type="checkbox"/>            | <b>Objections</b>    |  |   |
| <input type="checkbox"/>            | <b>Video Receipt</b> |  |   |
| <input type="checkbox"/>            | <b>CI Report</b>     |  |   |
| <input type="checkbox"/>            | <b>9202</b>          |  |   |
| <input checked="" type="checkbox"/> | <b>Order</b>         |  |   |
| <input type="checkbox"/>            | <b>Aff. Posting</b>  |  |   |
| <input type="checkbox"/>            | <b>Status Rpt</b>    |  |   |
| <input type="checkbox"/>            | <b>UCCJEA</b>        |  |   |
| <input type="checkbox"/>            | <b>Citation</b>      |  |   |
| <input type="checkbox"/>            | <b>FTB Notice</b>    |  |   |

|                                  |
|----------------------------------|
| <b>Reviewed by:</b> skc          |
| <b>Reviewed on:</b> 4/25/16      |
| <b>Updates:</b>                  |
| <b>Recommendation:</b> SUBMITTED |
| <b>File 23- Gibson</b>           |



Petitioner Gerilyn Stone (Pro Per, maternal grandmother)

## Petition for Appointment of Probate Conservator of the Person

|   |                  |    |   |
|---|------------------|----|---|
| NO TEMPORARY REQUESTED  |                  |    | NEEDS/PROBLEMS/COMMENTS:                          |
| GERILYN STONE, maternal grandmother, is<br>Petitioner.<br>~Please see Petition for details~<br>Court Investigator's Report was filed on<br>4/20/2016. |                  |    |   |
| Cont. from  |                  |    | Court Investigator Advised<br>Rights on 4/7/2016. |
|   | Aff.Sub.Wit.     |    |   |
| ✓   | Verified         |    |   |
|   | Inventory        |    |   |
| ✓   | Cap. Dec         |    |   |
|   | Not.Cred.        |    |   |
| ✓   | Notice of<br>Hrg |    |   |
| ✓   | Aff.Mail         | W/ |   |
|   | Aff.Pub.         |    |   |
|   | Sp.Ntc.          |    |   |
| ✓   | Pers.Serv.       |    |   |
| ✓   | Conf.<br>Screen  |    |   |
| ✓   | Letters          |    |   |
| ✓   | Duties/Supp      |    |   |
|   | Objections       |    |   |
| ✓   | Video<br>Receipt |    |   |
| ✓   | CI Report        |    |   |
|   | 9202             |    |   |
| ✓   | Order            |    |   |
|   | Aff. Posting     |    |   |
|   | Status Rpt       |    |   |
|   | UCCJEA           |    |   |
| ✓   | Citation         |    |   |
|   | FTB Notice       |    |   |
|   |                  |    | Reviewed by: LEG                                  |
|   |                  |    | Reviewed on: 4/25/16                              |
|   |                  |    | Updates:  |
|   |                  |    | Recommendation:                                   |
|   |                  |    | File 25- Guizar                                   |

**Probate Status Hearing RE: Proof of Appointments with Neurologist and  
Child Psychiatrist (PhD)**

|                                  |  |   |  |
|----------------------------------|--|---|--|
|                                  |  | <b>GENERAL HEARING 5/2/2016</b>   | <b>NEEDS/PROBLEMS/COMMENTS:</b>  |
|                                  |  | <b>Temporary petition denied/dismissed 3/15/16</b>  |  |
|                                  |  | <b>KATHLEEN V. KANALEY</b> , paternal grandmother, petitioned for temporary guardianship.   | <b>Minute order dated 4/19/16</b><br>orders the parties to meet daily at Attorney Jones' office at an agreed upon time to make calls together to find an agreed-upon provider. Parties are also ordered to go forthwith to the clerk's office and set up an appointment the Court Investigator. The status hearing was continued to 4/27/16. The general hearing remains set for 5/2/16. |
|                                  |  | <b>KATIE MARIE BACUD</b> , mother, filed an objection to guardianship on 3/15/16.   |  |
|                                  |  | <b>On 3/15/2016</b> , the Court denied the temporary petition, but set this status hearing for mother to bring proof of appointments (for minor) with a neurologist and child psychiatrist (PhD). |  |
| <b>Cont. from 032916, 041916</b> |  |   |  |
| <b>Aff.Sub.Wit.</b>              |  |   |  |
| <b>Verified</b>                  |  |   |  |
| <b>Inventory</b>                 |  |   |  |
| <b>PTC</b>                       |  |   |  |
| <b>Not.Cred.</b>                 |  |   |  |
| <b>Notice of Hrg</b>             |  |   |  |
| <b>Aff.Mail</b>                  |  |   |  |
| <b>Aff.Pub.</b>                  |  |   |  |
| <b>Sp.Ntc.</b>                   |  |   |  |
| <b>Pers.Serv.</b>                |  |   |  |
| <b>Conf. Screen</b>              |  |   |  |
| <b>Letters</b>                   |  |   |  |
| <b>Duties/Supp</b>               |  |   |  |
| <b>Objections</b>                |  |   |  |
| <b>Video Receipt</b>             |  |   |  |
| <b>CI Report</b>                 |  |   |  |
| <b>9202</b>                      |  |   |  |
| <b>Order</b>                     |  |   |  |
| <b>Aff. Posting</b>              |  |   |  |
| <b>Status Rpt</b>                |  |   |  |
| <b>UCCJEA</b>                    |  |   |  |
| <b>Citation</b>                  |  |   |  |
| <b>FTB Notice</b>                |  |   |  |
|                                  |  |   | <b>Reviewed by:</b> SEF  |
|                                  |  |   | <b>Reviewed on:</b> 4/22/2016  |
|                                  |  |   | <b>Updates:</b>  |
|                                  |  |   | <b>Recommendation:</b>   |
|                                  |  |   | <b>File 26- Kanaley</b>  |

Page 2

**Supplemental declaration filed 3/28/2016 by Petitioner Kathleen Kanaley states** Mother Katie Marie Bacud is not administering minor his necessary medications (i.e., iron and multivitamins with fluoride). She states she raised this same concern back in 2013. She states it is extremely important that mom administer these medications to minor on a daily basis to protect him from serious health complications.

**Probate Status Hearing Re: Filing of the Inventory and Appraisal**

|                          |                      |  |  |
|--------------------------|----------------------|--|--|
|                          |                      | <p><b>PATRICK KELLY WOLFE</b>, son, was appointed conservator of the estate without bond on 6/15/15.</p> <p>Letters issued on 8/5/15.</p> <p>Inventory and appraisal was due on 11/5/15.</p> <p>Notice of Status Hearing was mailed to Patrick Kelly Wolfe on 2/29/16.</p> | <p><b>NEEDS/PROBLEMS/COMMENTS:</b></p> <p><b>This matter is scheduled to be heard in Department 54 at 8:30 a.m.</b></p> <p>1. <b>Need Inventory and Appraisal or current written status report</b> pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p> |
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|                          |                      |  |  |
| <b>Cont. from</b>        |                      |  |  |
| <input type="checkbox"/> | <b>Aff.Sub.Wit.</b>  |  |  |
| <input type="checkbox"/> | <b>Verified</b>      |  |  |
| <input type="checkbox"/> | <b>Inventory</b>     |  |  |
| <input type="checkbox"/> | <b>PTC</b>           |  |  |
| <input type="checkbox"/> | <b>Not.Cred.</b>     |  |  |
| <input type="checkbox"/> | <b>Notice of Hrg</b> |  |  |
| <input type="checkbox"/> | <b>Aff.Mail</b>      |  |  |
| <input type="checkbox"/> | <b>Aff.Pub.</b>      |  |  |
| <input type="checkbox"/> | <b>Sp.Ntc.</b>       |  |  |
| <input type="checkbox"/> | <b>Pers.Serv.</b>    |  |  |
| <input type="checkbox"/> | <b>Conf. Screen</b>  |  |  |
| <input type="checkbox"/> | <b>Letters</b>       |  |  |
| <input type="checkbox"/> | <b>Duties/Supp</b>   |  |  |
| <input type="checkbox"/> | <b>Objections</b>    |  |  |
| <input type="checkbox"/> | <b>Video Receipt</b> |  |  |
| <input type="checkbox"/> | <b>CI Report</b>     |  |  |
| <input type="checkbox"/> | <b>9202</b>          |  |  |
| <input type="checkbox"/> | <b>Order</b>         |  |  |
| <input type="checkbox"/> | <b>Aff. Posting</b>  |  |  |
| <input type="checkbox"/> | <b>Status Rpt</b>    |  |  |
| <input type="checkbox"/> | <b>UCCJEA</b>        |  |  |
| <input type="checkbox"/> | <b>Citation</b>      |  |  |
| <input type="checkbox"/> | <b>FTB Notice</b>    |  |  |
|                          |                      | <p><b>Reviewed by:</b> KT</p> <p><b>Reviewed on:</b> 4/25/16</p> <p><b>Updates:</b></p> <p><b>Recommendation:</b></p> <p><b>File 1- Wolfe</b></p>  |  |